

Educational Buys/Monitoring Visits

At the Spring Public Health Meeting in April, there was some discussion around the value of conducting an “educational buy” during a monitoring visit. The benefit of an educational buy is to help cashiers identify redemption process errors, help them figure out what areas need improvement and to identify areas that are being done well. Combining educational buys with routine monitoring visits will help make the most of routine and required store visits. Retailer training seems to be an area in which improvement needs to be made and this type of buy can help foster training.

The state office will be requiring educational buys and monitoring visits for retailers that have failed their compliance buys, have a large number of check errors or have a large number of participant complaints. Educational buys may be conducted by state or local agency staff and at the state or local agencies’ discretion. If state staff requests a routine or required educational buy and monitoring visit to be conducted by local agency staff, the request will be listed in the cover letters for monitoring visits. Not *all* routine monitoring visits have to include an educational buy if it has been determined that the retail staff is well trained and would not benefit from the experience.

Educational buys are described in Chapter 9-18 (II) and detailed in Chapter 9-19(IV) of the state plan (the revised edition you received at the SPHM - LARC training), but here is a general idea of what is involved.

You will need to contact Trish at the state office at least two weeks prior to conducting the educational buy so that the *educational buy checks* may be printed and sent to you. Please arrange the day of the buy with the store manager, to ensure that you are arriving on a convenient day and time. The manager may or may not choose to inform their staff of the visit. Please allow two hours at the store for monitoring, conducting the buy, visiting with the bookkeeper to review any checks that are on hand, and to review the entire visit with the manager.

1. Educational buys are covert buys, similar to compliance buys.
2. WIC staff might attempt to buy:
 - incorrect food items (Fruity Pebbles, lemonade, juice blends)
 - a “non-WIC” item (water, pop)
 - unacceptable quantities (too much cereal)
 - an item not listed on the check (peanut butter or cheese when it is not listed)
 - or not offer your ID Packet at the time of purchase
3. Before the check is processed into the cash register, the transaction is stopped.
4. WIC staff would introduce themselves as WIC staff members, ask for a manager or head cashier, and then explain what went right in the purchase, what needs improvement, and describe what services the state and local agencies can offer to help.
5. The purchase is “voided” at the check stand, the food item returned to the store, and the check is returned to the WIC staff. The check and receipt is attached to the report form and returned to the state office.
6. Discuss the entire visit’s findings with the manager and what steps can be taken to correct any problems that were found. Write down any ideas discussed. The form is to be signed by the manager and the WIC staff member on page 2 after the review is completed. (A copy of the form is attached to the newsletter for your reference.) The completed form is to be sent to the state office for review. A response will be sent to the store with a copy sent to the LARC.

Please let us know if you have any questions!

Trish & Carrie